

2023-2024 IRS Tax Return Options

The federal verification process requires a review of your 2023-2024 Free Application for Federal Student Aid (FAFSA). There are different methods you can access to obtain the 2021 required IRS Tax Return and applicable IRS schedules. The recommended way to provide accurate 2021 IRS tax information would be by utilizing the IRS Data Retrieval Tool (DRT) on FAFSA using the instructions below:

- Income can be verified for the FAFSA through the usage of the IRS Data Retrieval Tool (DRT) at www.studentaid.gov
- Locate the FINANCIAL INFORMATION tab for either PARENT or STUDENT. Select ALREADY COMPLETED from the drop down box indicating that taxes were filed. Answer YES or NO to a series of eligibility questions for data retrieval. If you answered YES, you will not be able to use the IRS DRT. If you answered NO, enter parent or student FSA ID and click LINK TO IRS. A message will display "leaving FAFSA on the Web" because you are going to the IRS website. Click OK. Next click TRANSFER NOW for the 2021 IRS income tax information. After successful transfer, go to SIGN & SUBMIT tab/agree to terms. Click SUBMIT MY FAFSA. This process will generate an updated FAFSA to Point Park University. As a result of using the IRS DRT successfully, the IRS tax return will not be required. For web assistance from FAFSA, please call 1-800-433-3243.

INSTRUCTIONS - IF UNABLE TO USE THE IRS DRT TOOL - TELEPHONE REQUEST

 Tax filers can request a 2021 TAX RETURN TRANSCRIPT, (Do not select tax account transcript), free of charge, from the IRS by calling 1-800-908-9946. Information needed would be tax filer's social security number, date of birth, street address, and zip code.

INSTRUCTIONS - IF UNABLE TO USE THE IRS DRT TOOL - ONLINE REQUEST

Tax filers can request a 2021 TAX RETURN TRANSCRIPT, (Do not select tax account transcript), free of charge, from the IRS by downloading your tax return transcript at Get Transcript Online OR by requesting the 2021 IRS TAX RETURN TRANSCRIPT to be mailed.

http://www.irs.gov/Individuals/Get-Transcript



What The User Needs

To register and use this service, you need:

- <u>SSN</u>, date of birth, filing status and mailing address from latest tax return,
- access to user's email account,
- specific account numbers from a credit card, mortgage, home equity loan, home equity line of credit or car loan, and
- a text-enabled mobile phone linked to user's name

What User Get

- All transcript types are available online
- View, print or download your transcript
- Username and password to return later



What The User Needs

To use this service, you need:

- SSN or Individual Tax Identification Number (ITIN),
- date of birth, and
- mailing address from user's latest tax return

What User Get

- Return or Account <u>transcript types</u> delivered by mail
- Transcripts arrive in **5 to 10 calendar days** at the address we have on file for you

OTHER METHODS YOU CAN USE TO ACCESS THE 2021 REQUIRED IRS TAX RETURN AND APPLICABLE IRS SCHEDULES:

- 1. Access the tax software product you used to prepare and filed your 2021 IRS Tax Return and applicable schedules. You may be able to access your account to download/print a copy. OR
- 2. If you used a tax professional, contact the tax preparer/provider who filed your 2021 IRS Tax Return & applicable schedules for a signed copy of your tax return.

DOCUMENTS SUBMITTED MUST BE SIGNED and CONTAIN YOUR POINT PARK STUDENT ID NUMBER